



Reference Guide For Purchasers And Approvers

www.grandandtoy.com



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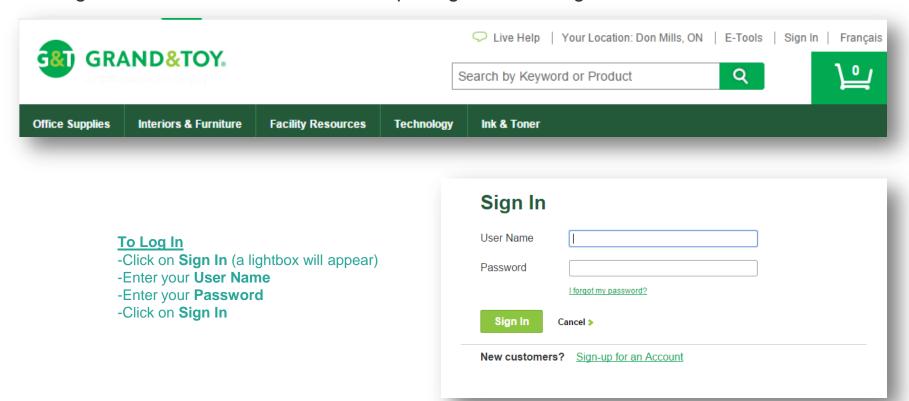
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Sign In

Sign in to access Business Account pricing and ordering tools.





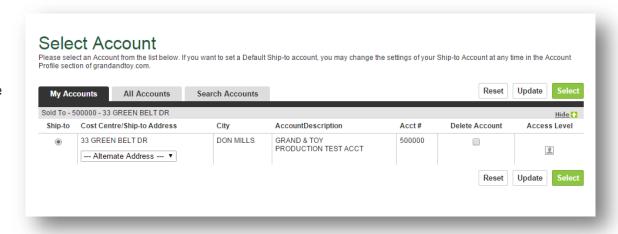


Selecting An Account

Purchasers who are assigned to more than one account or cost-centre will be prompted to select an ordering account on the Select Account page. This page is bypassed for purchasers who are assigned to a single account or cost-centre.

Selecting an Account

- -Using the radio button on the left, select the account on which to create the order
- -Click the Select button

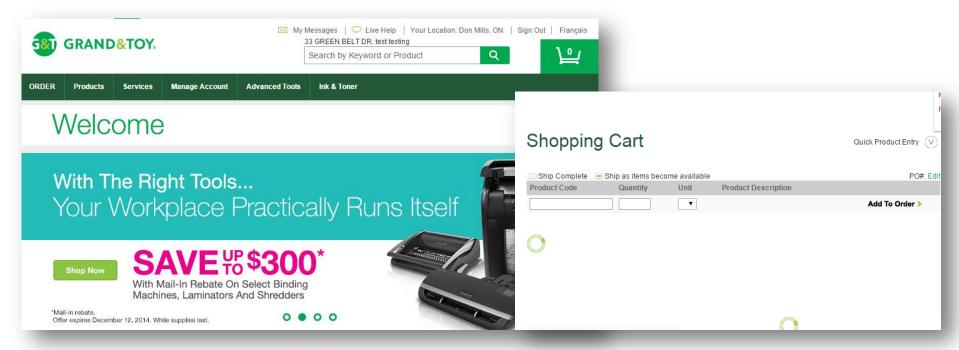






Order Details – Main Order Page

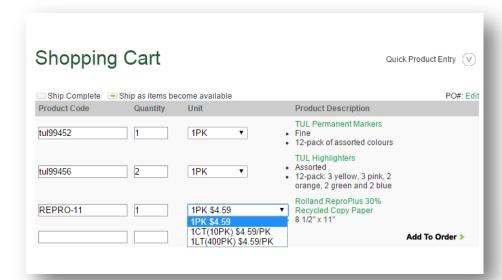
In most cases, a welcome page is displayed first. Click the ORDER tab or the cart at any time to access your Shopping Cart. Build, view, or modify your order directly from the Shopping Cart or browse for product using the quick search or the PRODUCTS and SERVICES tabs.







Order Details – Adding To An Order



View Extended Product Description

-Within the cart, click on the product number or image to view the full product details.

The product details are shown in a lightbox as see here →

Adding Items to your Order

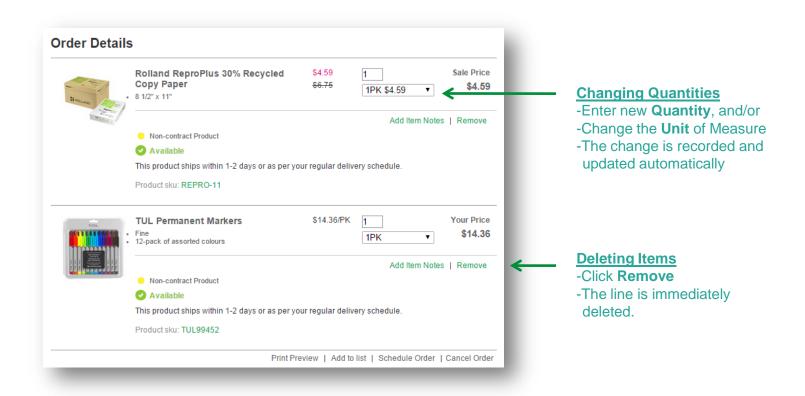
- -Enter the **Product code**
- -Enter the Quantity
- -Select the **Unit** of Measure
- -Click Add to Order





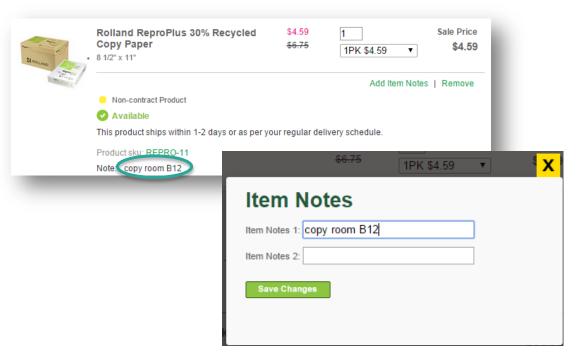


Order Details - Changing Quantities & Deleting Items





Order Details – Adding Item Notes

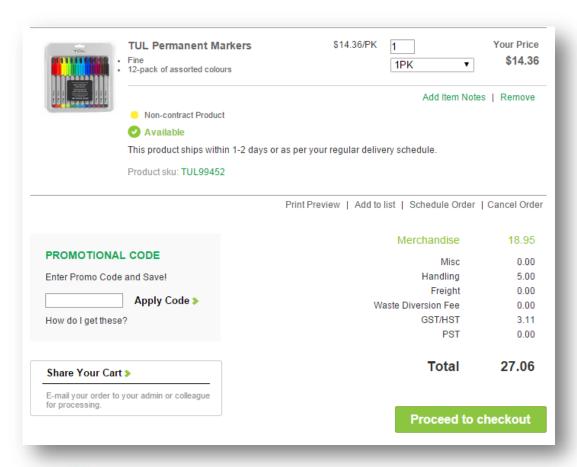


Adding Item Notes

- -Click Add Item Notes
- -Enter the notes
- -Click Save Changes
- ✓ Adding Item Notes can be especially helpful when ordering for multiple people or departments add a note as a reminder of who the item is ordered for. The notes are printed on the packing slip and invoice.



Order Details - Checkout



Submitting the order

-Click the **Proceed to checkout**button located at the bottom of the cart.

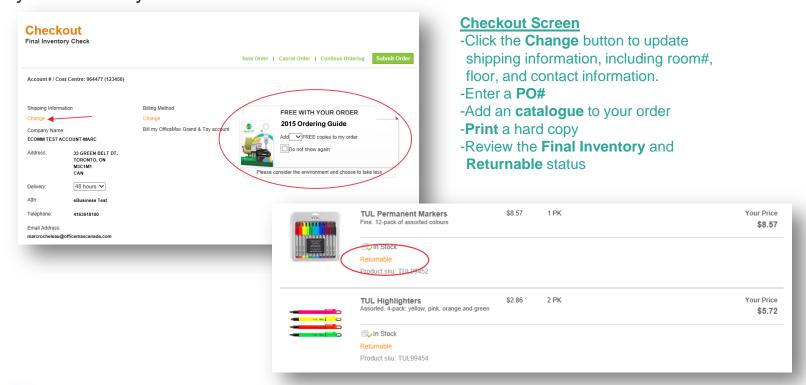
✓ A Final Inventory Check is performed during checkout as the inventory may have changed during the ordering process. This is particularly important if the order was built over several hours or days. The inventory is again reflected on the final checkout screen.





Check Out – Main Checkout Page

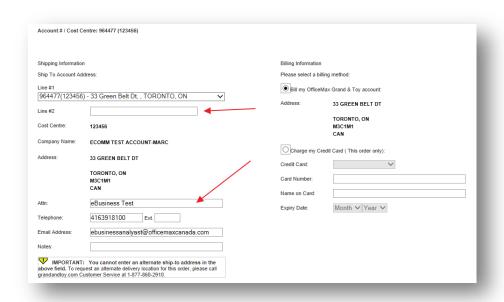
This is your final step before submitting your order. Once your order is verified, you are ready to submit it.







Check Out – Changing Shipping Information

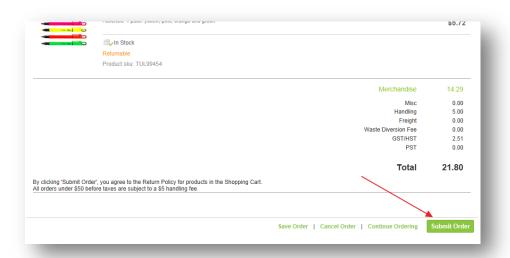


▼ To override the room/floor for a single order, key the information in the field labeled 'Line #2'. Also update the 'Attn', 'Telephone', and 'Email' to reflect the recipient's information. Click 'Next' when done.





Check Out – Submitting The Order



Final Step to Submitting the Order

-Verify the totals and click **Submit Order**

✓ Approval Process:

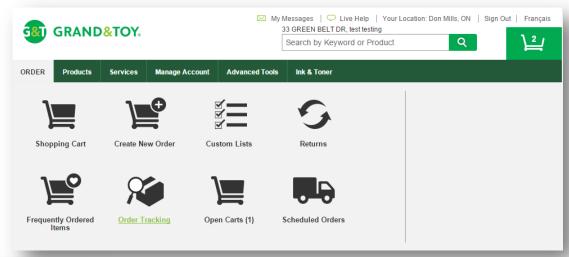
- -Purchaser submits order
- -Approver receives email notification
- -Approver logs in and approves order
- -Purchaser receives email notification listing any changes (if applicable)

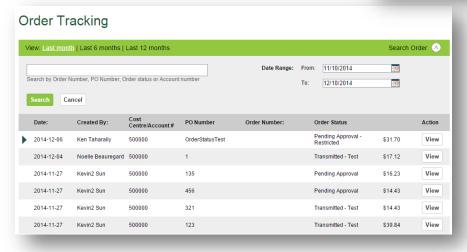


Order Tracking

<u>Viewing the status of an order</u>
-Click **Order Status** found under the ORDER tab.

▼ The orange Top Menu bar is visible on every page after login





The **Order Tracking** page will display your order history. Common examples include:

- ➤ Pending Completion
- ➤ Pending Approval
- ➤ Pending Final Approval
- **≻**Transmitted

Order history is available for 180 days.

A 6 digit Order Number is displayed once an order has been submitted for processing.



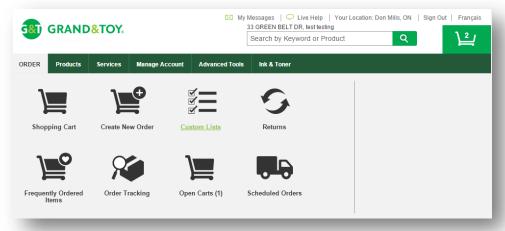


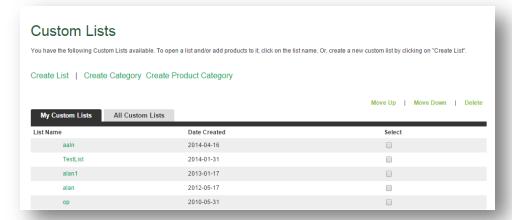
Custom Lists - Overview

Finding Custom Lists

Custom Lists are often referred to as a 'Favourites', 'Core Product Lists', 'Preferred Product Lists' or 'Order Templates'. They can be created as personal lists or created by an administrator and shared for the entire organization. Custom Lists are found under the ORDER tab.

Create personal Custom Lists under the 'My Customer Lists' tab.









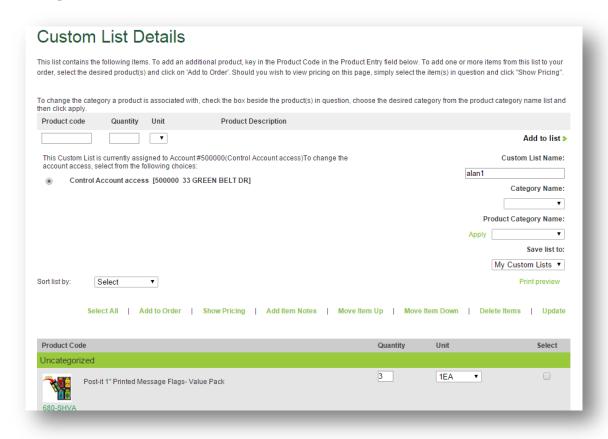
Custom Lists – Viewing A Custom List

Adding an item to your order

- -Select the products
- -Click Add to Order

Display pricing/inventory

- -Select the products
- -Click Show Pricing
- ✓ Items in custom lists are grouped in categories. The categories are sorted alphabetically.



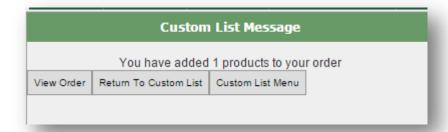




Custom Lists – Adding To An Order

Once you have added the items to your order, a dialog window will pop up, giving you 3 options:

- -View Order: Brings you to the Order Details page.
- **-Return To Custom List**: Brings you back to the current custom list that you are viewing.
- -Custom List Menu: Brings you to the My Custom Lists page.

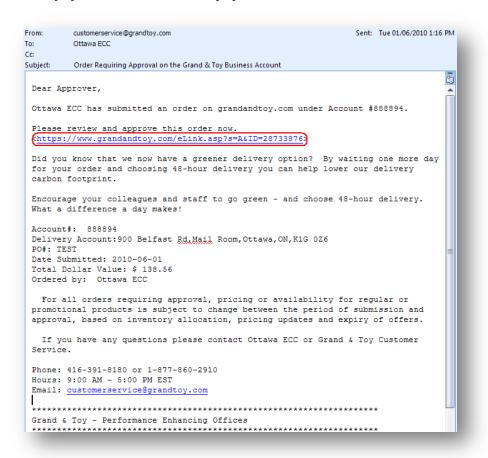


✓ It is recommended that pop-up's be enabled for grandandtoy.com. If pop-up's are blocked, the dialog window shown above will be suppressed – the browser will lead directly to the Order Details page.





Approvals – Approval Email Notification



When a Purchaser submits an order, the Approvers assigned to the account will each receive an email notification. In the case where an account has multiple approvers, the order will require verification from only one Approver per approval level.

Viewing an order to be approved

- -Click the email link
- -Sign in to grandandtoy.com
- ✓ On rare occasions the link within the email will not work. The most common reasons are:
 - -Order was re-opened by the Purchaser
 - -Order was already Approved

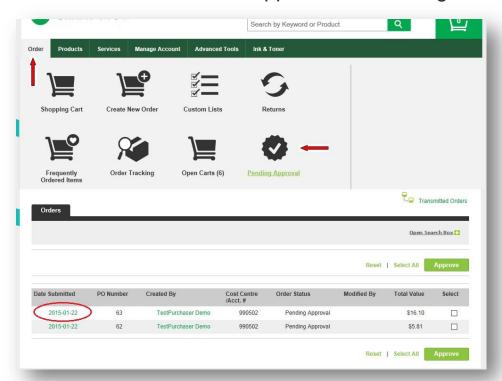
In the event the link within the email is broken, access the Pending Approval Page via: **Order Status > Pending Approval**





Approvals - Pending Approval Page

The page below displays the orders that are in a Pending Approval status for all of the accounts to which an approver has been granted approval rights.



Viewing Pending Approval orders

- -Select Pending Approval under the ORDER tab
- -Click the **Date Submitted** to view the order details

Accessing a "Pending Approval" order using this method will have the same result as using the link within the approval email.



Approvals – Viewing & Approving Orders

In addition to Approving and Declining orders, Approvers also have the ability to edit orders prior to approving.

Deleting Items from the order

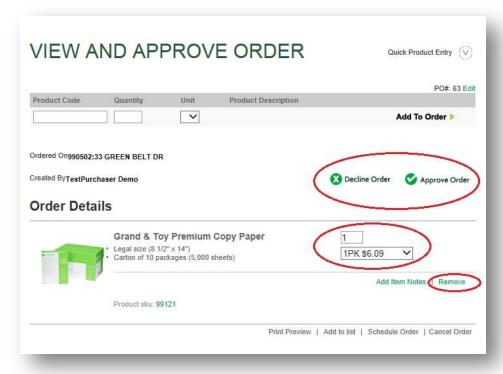
- -Find the items item(s)
- -Click Remove
- -The item is deleted immediately

Modifying Quantities

- -Enter a new Quantity
- -The update is recorded automatically

Adding Items to the order

- -Enter the **Product code**
- -Enter the Quantity
- -Select the **Unit** of Measure
- -Click Add to Order







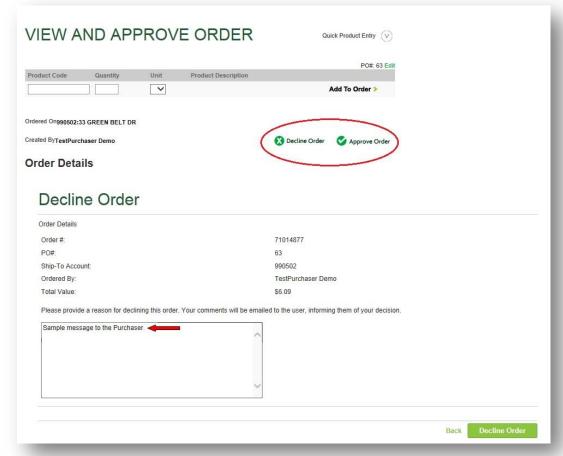
Approvals – Approving An Order

▼ The Purchaser will receive a confirmation email shortly after the order is approved or declined.

Order confirmation email consists of:

- The approver's name
- G&T Order #, Account #, PO #
- Delivery address
- Order summary

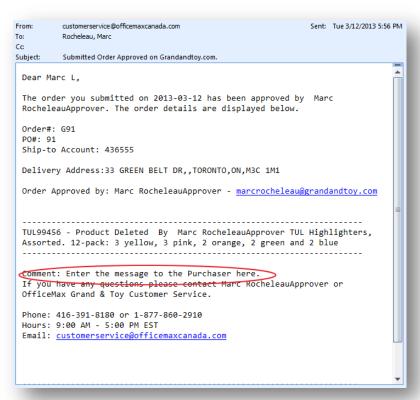
If an order is modified during the approval process or declined, the Approver will be prompted to add a note that will be included in the email back to the Purchaser along with a list of the modifications.







Approval – Approved Order Emails



customerservice@officemaxcanada.com Sent: Thu 3/21/2013 4:33 PM Rocheleau, Marc Cc: Subject: Thank you for placing your order on www.officemaxcanada.com under Account # 964477(123456). Your order number is 465298. Please refer to this number when making inquiries. Or, view the status of your order now. <https://www.officemaxcanada.com/eLink.asp?s=0&ID=45106685&n=465298&d=3/21203 > ORDER #: 465298 DELIVERY ADDRESS:33 GREEN BELT DR., TORONTO, ON, M3C1M1 DATE: 3/21/2013 YOUR PO#: 103 MERCHANDISE: 22.49 WASTE DIVERSION FEE: 0.00 FREIGHT: 0.00 GST: 0.00 PST/HST: 3.57 MISC: 0.00 TOTAL: 31.06 Product Info: TUL99452 - TUL Permanent Markers, Fine. 12-pack of assorted colours Quantity Ordered: 1 PK Unit Price: \$12.61 Amount: \$12.61 Product Info: TUL99456 - TUL Highlighters, Assorted. 12-pack: 3 yellow, 3 pink, 2 orange, 2 green and 2 blue Quantity Ordered: 1 PK Unit Price: \$9.88 Amount: \$9.88 OfficeMax Grand & Toy - Performance Enhancing Offices

Order Approval Email Confirmation Sample (listing modifications by approver, if any)

Order Confirmation Email Sample





Approvals – Declined Order Email



Re-opening orders

- -Click on Order Status
- -Click the Date Submitted
- -Re-open Order button

If an order is declined by an Approver, it is returned to a "Pending Completion" status. This allows the purchaser to make modifications without having to recreate the order.

Order Declined Email Confirmation Sample (displaying reason for decline)





Customer Care

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